¡SG Provider Lens™

Martech Service Providers

A research report on martech service providers
most relevant to the success of their clients

Table of Contents

Each year, distinguishing marketing from technology becomes increasingly difficult since cross-channel and omnichannel experiences have evolved from mere trends to essential requirements. A hybrid experience has always been the standard consumer expectation. Today, companies that fail to deliver an omnichannel experience face growing customer complaints and frustrations.

Marketing is reclaiming its original role as the customer's voice within organizations, which was assumed by IT due to the concentration of talent better equipped to navigate digital transformation. IT and marketing should collaborate more now than ever to win over customers in this physical and digital continuum.

In this edition, we have considered three key activities that address the challenges of martech. The first is to establish a strong brand presence on digital channels so that it is seen, found and evaluated, extending the reach and relevance of its communications.

The second challenge is to provide a relevant and positive experience to everyone that uses the brand's digital channels. Marketing should involve technology to deliver the best experience through innovative, intelligent, personalized interfaces.

Finally, the wide range of digital communication tools and platforms, often adopted organically, results in a large volume of unstructured and fragmented data. Extracting intelligence from this unstructured data is a process involving complex challenges. However, it is essential for unlocking transformative insights. Decision-makers and buyers of martech services can acquire valuable analyses to help them select the ideal partners to achieve their marketing goals.

The wide range of martech services is **categorized into three essential areas** for decision-makers within end-user companies.

Digital Presence & Digital Ads

Digital Experience

Analytics & Intelligence

Simplified Illustration Source: ISG 2024
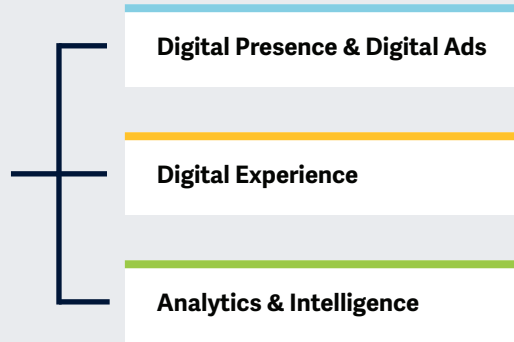
The ISG Provider Lens™ martech Service Providers 2024 study offers the following for business decision-makers:

- Transparency about the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segment according to their competitive strengths and their portfolio attractiveness

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients use information from these reports to evaluate their current vendor relationships and potential engagements.

Digital Presence and Digital Ads

Definition

This quadrant includes service providers that help companies advertise and promote brands and products in the digital environment to maximize communication reach and impact.

Services in this space include marketing using organic approaches, such as social media, content marketing, viral marketing, direct messaging and search engine optimization, or paid marketing, such as influencers and programmatic media on platforms such as search services, social media ads, marketplaces and digital out-of-home media.

This quadrant primarily assesses the provider's ability to leverage technological marketing resources in an innovative and integrated manner, focusing on reaching new qualified audiences, generating traffic and maximizing the effectiveness of marketing campaigns.

Services and skills commonly related to this quadrant may include the following:

- Planning campaigns integrated into the digital environment
- Implementing search engine marketing (SEM)
- Utilizing social media marketing (SMM)
- Optimizing website or SEO for search engine ranking
- Creating programmatic media pieces
- Executing inbound and outbound marketing campaigns
- Explore marketing automation resources to reach the right audience
- Developing content marketing and managing social media
- Optimizing segmentation strategies such as lookalike, remarketing and geolocation
- Engaging in influencer marketing
- Tracking traffic, engagement and conversions

Eligibility Criteria

1. Have the **technical qualifications** to manage campaigns on a wide variety of programmatic media platforms

2. Demonstrate productive capacity for **content production and social media management**

3. Adopt a consistent methodology for **planning, managing** and **optimizing** traffic campaigns on multiple platforms

4. Take various approaches to expand a brand's **organic presence** in the digital environment

5. Showcase success stories that demonstrate the **creative and innovative use of** programmatic media platforms and organic content distribution platforms

6. Demonstrate results management capabilities that consider a mature **attribution model with ROI** estimation based on conversions

7. Adopt procedures and standards to ensure **compliance with regulatory requirements**, especially related to **data protection**

Digital Experience

Definition

This quadrant includes service providers that assist companies in enhancing consumer experience through technology. Their focus lies in developing and improving interfaces, considering a broad range of digital media, resulting in more relevant, seamless and impactful brand interactions. The aim of these services is to create a frictionless journey for end-users in digital channels.

Every digital experience takes place through an interface, including websites, applications on mobile devices, game consoles, smart TVs, chats, and AR-, VR- and mixed reality-based platforms. In this context, the consumer experience encompasses a broad range of devices, including those that integrate digital and physical elements, such as events.

This quadrant primarily assesses the provider's ability to design and produce a differentiated and improved experience for the end consumer, focusing on the client's business objectives.

Services and skills commonly related to this quadrant may include the following:

- Creating and prototyping interfaces
- Using data to personalize the experience
- Creating digital assistants
- Creating games
- Developing animations or videos
- Creating immersive experiences, such as AR, VR and MR
- Producing and optimizing landing pages and websites
- Developing social networks or producing collaborative content
- Utilizing A/B tests, heat maps and other analytical tools as decision support
- Executing cross-media actions

Eligibility Criteria

1. Demonstrate cases of innovation and creativity in the **conception, planning and prototyping** of digital experience

2. Showcase the **technical skills** required to produce interfaces on a variety of platforms, such as websites, applications, games and chatbots

3. Demonstrate success stories in the **creative exploitation of emerging technologies** such as AI, AR, VR and MR

4. Highlight results management that mainly focuses on **the impact of UX** in relation to the client's brand

5. Apply processes or methodologies that **use data to support decisions** for experience improvement

6. Implement procedures and standards to **ensure compliance with regulatory requirements**, especially related to **data protection**

Analytics and Intelligence

Definition

This quadrant includes providers whose services cover the analytical and structural aspects of using technology in marketing. It involves collecting data, processing and enriching it when necessary, followed by analyzing and integrating market intelligence, and finally, providing insights and opportunities for improvement for both campaigns and channels.

Digital marketing differs from traditional marketing in the availability of data accumulated with every interaction. Transforming this data into information and insights requires a structured approach and technical proficiency.

Therefore, providers included in this quadrant must be able to handle large volumes of data from multiple marketing platforms. This data must be consolidated and converted into metrics within an analytical model to extract various insights, primarily focusing on identifying opportunities that improve user journeys, thus aligning with clients' marketing objectives.

Services and skills commonly related to this quadrant may include the following:

- Assessment and guidance for adopting an analysis model
- Utilizing web analytics tools
- Implementing feedback tools and surveys
- Unifying and processing data
- CRO – Convertion Rate Optimization
- Employing heat maps, tracking traffic, engagement and conversions
- Applying predictive analysis and simulations, such as lead scoring, churn propensity and customer lifetime value (CLV)

Eligibility Criteria

1. Demonstrate methodology and/ or success stories in analyzing the maturity of technology management in marketing and identifying gaps and improvement opportunities

2. Showcase **technical skills** in using key web analytics, CRM, research and feedback tools

3. Present a model for mapping and understanding the **user's digital journey** to guide data analysis

4. Demonstrate success stories in **recognizing improvements** based on the analysis of large volumes of data from various sources

5. Establish procedures and standards to **ensure compliance with regulatory requirements**, especially those related to **data protection**

Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we present the following three quadrants on the MarTech Service Providers of 2024:

Quadrant	Brazil
Digital Presence and Digital Ads	✔
Digital Experience	✔
Analytics and Intelligence	✔

Note : *APAC regions (excluding Japan, South Korea and China/Taiwan)

The research phase will run from August to December 2024 and results will be presented in January 2025.

Milestones

Milestones	Home	End of story
Research launch	September 2nd, 2024	
Research phase	September 3rd, 2024	October 3rd, 2024
Results Preview	November 2024	December 2024
Press Release and Publication	February 2025	

Collecting customer testimonials through the Star of Excellence™ Program requires providers to nominate customers at the beginning of the process (no official nomination required) because CX scores have a direct influence on the provider's position in the IPL quadrant and awards.

See the link to view/download the 2024 ISG Provider Lens™ research calendar.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens 2024 – Martech Service Providers research study analyzes the relevant software vendors/service providers in the Brazil market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Namratha Dharshan

Lead Author:
Daniel Rodrigo Bastreghi

Research Analyst:
Rafael Rigotti

Data Analyst:
Aishwarya Pateria

Project Manager:
Arthur Moura

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2024, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.
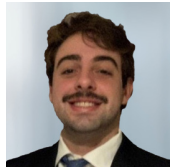
Contacts For This Study

Study Sponsor

Namratha
Dharshan

Business Leader

Daniel Rodrigo
Bastreghi

Lead Analyst, Brazil

Rafael
Rigotti

Research Analyst, Brazil

Arthur
Moura

Project Manager, Brazil

ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

Invited Companies

If your company is listed on this page or you think your company should be listed, please contact ISG to ensure we have the correct contacts to actively participate in this survey.

* Evaluated in the previous iteration

Accenture Song*	EssenceMediacom	Media.Monks*	Senso Performance
Adtail	Foster	Mirum	Senso Performance
Arctouch	Gauge	MRM Commerce*	Smollan iTrade
Brivia*	Heads	Mutato*	Soko
Brivia*	Heads	Ogilvy Brazil	Soko
Conversion	Hogarth	OpusMultiple	Strategy& (PwC)*
Corebiz	IPG Mediabrands Brazil	OpusMultiple	Strategy& (PwC)*
Craft	Jellyfish*	Peppery	The Holos Company
David	Jüssi*	Peppery	Try
Deloitte Digital	Keyrus*	Pmweb*	V4 Company
Dentsu Creative	Kinesso	R/GA	V4 Company
Digital Nation*	Koro United Creators	Register*	Vitrio*
DP6*	Koro United Creators	Register*	Vitrio*
DTI	Marketdata	Rock Content	VML Commerce
Enext Consulting	Math	Scalalabz	W3Haus (Stefanini)*

Invited Companies

Wake (Squid)*

Weber Shandwick

X.Lab

xlabi-Cherry

About Our Company & Research

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

BROCHURE: MARTECH SERVICE PROVIDERS